



State of California

HEALTH AND HUMAN RESOURCES AGENCY
EMPLOYMENT DEVELOPMENT DEPARTMENT, MIC 4
P.O. BOX 826880, SACRAMENTO, CA 94280-0001

APPLICATION FOR TRANSFER OF RESERVE ACCOUNT

INSTRUCTIONS - Please read and complete this form carefully. If you acquired a business from an employer who was registered with the Employment Development Department, you may apply for a transfer of all or a part of the reserve account. (A reserve account is used to determine the unemployment insurance [UI] tax rate.) Not all reserve account balances are desirable. If the transfer of your predecessor's reserve account is approved, you will be subject to all or a percentage of the predecessor's benefit charges, which could increase your rate in future years. If you need additional information, please call (916) 653-7795, Contribution Rate Group. Failure to completely answer all questions may result in a delay or denial of approval of this application. If more space is needed for explanation, attach separate sheets.

**ANY APPLICATION FOR
TRANSFER FILED LATER THAN
90 DAYS AFTER ACQUIRING
THE BUSINESS MAY BE
RESTRICTED.**

I. Complete the following:

1. Your account number _____ 2. Your name _____

Your federal account number (FEIN) _____

3. Your business name _____

4. Your business address _____ ZIP _____

5. Name of business acquired _____

6. Former owner's name _____

7. Former owner's account number _____

8. Former owner's business location _____ ZIP _____

9. Date of acquisition _____

10. Was the acquisition by (Check one)
- | | |
|--------------------------|-------------------------|
| <input type="checkbox"/> | purchase \$ _____ |
| <input type="checkbox"/> | merger or consolidation |
| <input type="checkbox"/> | stock exchange |
| <input type="checkbox"/> | other (explain below) |

11. Please check major assets acquired

- | | |
|--|---|
| <input type="checkbox"/> Place of business | <input type="checkbox"/> Staff of employees |
| <input type="checkbox"/> Customers | <input type="checkbox"/> Goodwill |
| <input type="checkbox"/> Trade name | <input type="checkbox"/> Stock in trade |
| <input type="checkbox"/> Accounts receivable | <input type="checkbox"/> Tools and fixtures |

12. Did you continue the operation of business you acquired? ☐ Yes ☐ No

If no, please explain _____

13. Number of workers employed by seller just before sale _____

14. Number of workers employed by you _____

15. Are you a labor contractor, employment agency or other provider of employment services?

If yes, explain operation _____

16. You took over from the former owner:

(a) **ALL** the business: ☐ (If you checked this box, go directly to Section III)

(b) **PART** of the business: ☐ (If you checked this box, complete Sections II and III)

II. 1. That portion of the business which you acquired was started by its original owner on (date) _____

2. The taxable wages, for the portion of the former owner's business which you acquired, were as follows:

(USE ONLY WAGES UP TO THE \$7,000 ANNUAL LIMIT FOR EACH EMPLOYEE FOR CALENDAR YEARS LISTED BELOW).

For entire calendar years of: 1996 \$ _____ 1997 \$ _____ 1998 \$ _____

- BY QUARTERS -

JAN. 1 TO MARCH 31	APRIL 1 TO JUNE 30	JULY 1 TO SEPT. 30	OCT. 1 TO DEC. 31
1999 \$ _____	\$ _____	\$ _____	\$ _____
2000 \$ _____	\$ _____	\$ _____	\$ _____

IF YOU CANNOT GET EXACT FIGURES, you may give us your estimate. We will then send your figures to the former owner to approve or correct.

DID YOU ESTIMATE THESE FIGURES? ☐ Yes ☐ No DID THE FORMER OWNER APPROVE THESE FIGURES? ☐ Yes ☐ No

III. Please list the name and phone number of the person we can contact for further information if needed.

Print Name: _____ Phone: (____) _____

SIGN AND DATE: **I/we hereby make application for transfer of reserve account and declare that the above information is correct to the best of our knowledge and belief.**

Signature: _____ Phone: (____) _____

Title: _____ Date: _____

FOR DEPARTMENTAL USE ONLY: Transfer type: _____ CUIC Section: _____ Effective Qtr: _____

Date Completed: _____ Completed by: _____ Reviewed by: _____

Notes: _____